

Notice of Allowability

Application No.

09/608,293

Examiner

Andre Boyce

Applicant(s)

MISSINHOUN ET AL.

Art Unit

3623

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address--

All claims being allowable, PROSECUTION ON THE MERITS IS (OR REMAINS) CLOSED in this application. If not included herewith (or previously mailed), a Notice of Allowance (PTOL-85) or other appropriate communication will be mailed in due course. **THIS NOTICE OF ALLOWABILITY IS NOT A GRANT OF PATENT RIGHTS.** This application is subject to withdrawal from issue at the initiative of the Office or upon petition by the applicant. See 37 CFR 1.313 and MPEP 1308.

1. ☒ This communication is responsive to Applicant's After final amendment filed May 25, 2007.
2. ☒ The allowed claim(s) is/are 1,5,7,21-28 and 30-32.
3. ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
 - a) ☐ All b) ☐ Some* c) ☐ None of the:
 1. ☐ Certified copies of the priority documents have been received.
 2. ☐ Certified copies of the priority documents have been received in Application No. _____.
 3. ☐ Copies of the certified copies of the priority documents have been received in this national stage application from the International Bureau (PCT Rule 17.2(a)).

* Certified copies not received: _____.

Applicant has THREE MONTHS FROM THE "MAILING DATE" of this communication to file a reply complying with the requirements noted below. Failure to timely comply will result in ABANDONMENT of this application.

THIS THREE-MONTH PERIOD IS NOT EXTENDABLE.

4. ☐ A SUBSTITUTE OATH OR DECLARATION must be submitted. Note the attached EXAMINER'S AMENDMENT or NOTICE OF INFORMAL PATENT APPLICATION (PTO-152) which gives reason(s) why the oath or declaration is deficient.
 5. ☐ CORRECTED DRAWINGS (as "replacement sheets") must be submitted.
 - (a) ☐ including changes required by the Notice of Draftsperson's Patent Drawing Review (PTO-948) attached
 - 1) ☐ hereto or 2) ☐ to Paper No./Mail Date _____.
 - (b) ☐ including changes required by the attached Examiner's Amendment / Comment or in the Office action of Paper No./Mail Date _____.
- Identifying indicia such as the application number (see 37 CFR 1.84(c)) should be written on the drawings in the front (not the back) of each sheet. Replacement sheet(s) should be labeled as such in the header according to 37 CFR 1.121(d).
6. ☐ DEPOSIT OF and/or INFORMATION about the deposit of BIOLOGICAL MATERIAL must be submitted. Note the attached Examiner's comment regarding REQUIREMENT FOR THE DEPOSIT OF BIOLOGICAL MATERIAL.

Attachment(s)

1. ☒ Notice of References Cited (PTO-892)
2. ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)
3. ☐ Information Disclosure Statements (PTO/SB/08),
Paper No./Mail Date _____
4. ☐ Examiner's Comment Regarding Requirement for Deposit
of Biological Material
5. ☐ Notice of Informal Patent Application
6. ☐ Interview Summary (PTO-413),
Paper No./Mail Date _____
7. ☐ Examiner's Amendment/Comment
8. ☒ Examiner's Statement of Reasons for Allowance
9. ☐ Other _____

Beth Van Doren
Beth Van Doren
Au 3623
Primary Examiner

DETAILED ACTION

1. This action is in response to Applicant's After final amendment filed May 25, 2007. Claims 1, 5, 21 and 27 have been amended. Claims 2, 4, 6 and 29 have been canceled. Claims 1, 5, 7, 21-28 and 30-32 are pending.
2. The previously pending rejections to claims 27-30 under 35 U.S.C. 112, second paragraph, have been withdrawn

Reasons for Allowance

3. Claims 1, 5, 7, 21-28 and 30-32 are allowed.
4. The following is an examiner's statement of reasons for allowance:

With respect to independent claim 1, none of the prior art of record, taken individually or in any combination, teach inter alia automatically calculating a customer value for the customer based on historical customer interaction information contained in interaction databases including previous activities, purchases, or accounts of the customer recorded and stored on systems belonging to and backed up by the customer interaction center as transaction records for previous transactions between the customer and the customer interaction center over all possible channels, including reconciling the transaction records from different channels to produce the customer value; determining whether said customer value exceeds a predetermined customer value threshold, the customer value threshold defining the channels through which the current interaction may proceed so that

lower valued customers have access only to channels requiring less interaction with a customer service representative of the customer interaction center and channels providing a slower than real-time response to queries from the customer; and conducting the interaction in accordance with the selected option; retrieving a contact history that corresponds to said customer from a contact history database; presenting the contact history to a customer service representative (CSR); and interacting with the customer in accordance with the contact history, wherein said contact history comprises information related to previous interactions with the customer; receiving a request from a client computing device; determining whether said request originates from a first client computing device comprising a first processor or from a second client computing device comprising a second processor, wherein said first client computing device comprises a slower central processing unit and a lower resolution display than said second client computing device; and responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with said first client computing device if said request originated from said first client computing device ; responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with said second client computing device if said request originated from said second client computing device.

With respect to independent claim 21, none of the prior art of record, taken individually or in any combination, teach inter alia automatically calculating a customer value for the customer based the previous activities, purchases and

accounts of each customer and on the data about a profile and preferences of the customer, the customer contact history data and data about a current interaction with the customer retrieved from the interaction database system stored on systems belonging to and backed up by the customer interaction center; if the customer value is less than a predetermined threshold, presenting the customer with a partial list of options for interaction with the CSR, and receiving a selected option from the customer, and automatically conducting the interaction in accordance with the selected option; retrieving a contact history that corresponds to said customer from a contact history database; presenting the contact history to a customer service representative (CSR); and interacting with the customer in accordance with the contact history, wherein said contact history comprises information related to previous interactions with the customer; receiving a request from a client computing device; determining whether said request originates from a first client computing device comprising a first processor or from a second client computing device comprising a second processor, wherein said first client computing device comprises a slower central processing unit and a lower resolution display than said second client computing device; and responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with said first client computing device if said request originated from said first client computing device; responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format

compatible with said second client computing device if said request originated from said second client computing device.

With respect to independent claim 27, none of the prior art of record, taken individually or in any combination, teach *inter alia* automatically calculating a customer value for the customer based on historical customer interaction information contained in interaction databases including the recorded transaction records, including reconciling the transaction records from different channels to produce the customer value; comparing the customer value with a predetermined customer value threshold, the customer value threshold defining the channels through which the current interaction may proceed; based on the comparison, determining a channel through which the customer interaction between the customer and the customer interaction center will be conducted; during interaction with the customer, retrieving from a contact history database a contact history that corresponds to the customer, the contact history including information related to previous interactions between the customer and the customer interaction center; presenting the contact history to a Customer Service Representative (CSR); and interacting with the customer in accordance with the contact history, including receiving a request from a client computing device of the customer; determining whether the request originates from a first client computing device comprising a first processor or from a second client computing device comprising a second processor, wherein the first client computing device comprises a slower central processing unit or a lower resolution display than the second client computing device; and responding to the request by adjusting and

customizing the level of graphics and data sent to the client device to a format compatible with the first client computing device if the request originated from the first client computing device; and responding to the request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with the second client computing device if the request originated from the second client computing device.

5. The prior art references most closely resembling Applicant's claimed invention are Bushey et al (USPN 6,389,400) and Kannan (US 2001/0054064).

Bushey et al disclose customer contacts the service center through a customer interface, including telephone, interactive voice response system, internet, or computer, contact via a channel, wherein the interface may be any of a variety of devices that allow communication between a customer and the service center, and a customer score, developed from information obtained through customer task and query along with background information is quantified into a customer score.

Kannan discloses determining whether the customer qualifies for live service by comparing the customer's profile/status with service records in database, and/or whether the customer logged on using a known account number, determining from the customer profile whether a customer is high-margin/low-margin provider and whether the interaction will be simple or complex, and the customer selecting the type of customer service wanted, including via computer (question/answer) or phone

(live CSR), based upon the authorization for the type of customer service the customer can receive.

However, with respect to claim 1, neither Bushey et al nor Kannan disclose automatically calculating a customer value for the customer based on historical customer interaction information contained in interaction databases including previous activities, purchases, or accounts of the customer recorded and stored on systems belonging to and backed up by the customer interaction center as transaction records for previous transactions between the customer and the customer interaction center over all possible channels, including reconciling the transaction records from different channels to produce the customer value; determining whether said customer value exceeds a predetermined customer value threshold, the customer value threshold defining the channels through which the current interaction may proceed so that lower valued customers have access only to channels requiring less interaction with a customer service representative of the customer interaction center and channels providing a slower than real-time response to queries from the customer; and conducting the interaction in accordance with the selected option; retrieving a contact history that corresponds to said customer from a contact history database; presenting the contact history to a customer service representative (CSR); and interacting with the customer in accordance with the contact history, wherein said contact history comprises information related to previous interactions with the customer; receiving a request from a client computing device; determining whether said request originates from a first client computing

device comprising a first processor or from a second client computing device comprising a second processor, wherein said first client computing device comprises a slower central processing unit and a lower resolution display than said second client computing device; and responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with said first client computing device if said request originated from said first client computing device ; responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with said second client computing device if said request originated from said second client computing device.

With respect to claim 21, neither Bushey et al nor Kannan disclose automatically calculating a customer value for the customer based the previous activities, purchases and accounts of each customer and on the data about a profile and preferences of the customer, the customer contact history data and data about a current interaction with the customer retrieved from the interaction database system stored on systems belonging to and backed up by the customer interaction center; if the customer value is less than a predetermined threshold, presenting the customer with a partial list of options for interaction with the CSR, and receiving a selected option from the customer, and automatically conducting the interaction in accordance with the selected option; retrieving a contact history that corresponds to said customer from a contact history database; presenting the contact history to a customer service representative (CSR); and interacting with the customer in

accordance with the contact history, wherein said contact history comprises information related to previous interactions with the customer; receiving a request from a client computing device; determining whether said request originates from a first client computing device comprising a first processor or from a second client computing device comprising a second processor, wherein said first client computing device comprises a slower central processing unit and a lower resolution display than said second client computing device; and responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with said first client computing device if said request originated from said first client computing device; responding to said request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with said second client computing device if said request originated from said second client computing device.

With respect to 27, neither Bushey et al nor Kannan disclose automatically calculating a customer value for the customer based on historical customer interaction information contained in interaction databases including the recorded transaction records, including reconciling the transaction records from different channels to produce the customer value; comparing the customer value with a predetermined customer value threshold, the customer value threshold defining the channels through which the current interaction may proceed; based on the comparison, determining a channel through which the customer interaction between the customer and the customer interaction center will be conducted; during

interaction with the customer, retrieving from a contact history database a contact history that corresponds to the customer, the contact history including information related to previous interactions between the customer and the customer interaction center; presenting the contact history to a Customer Service Representative (CSR); and interacting with the customer in accordance with the contact history, including receiving a request from a client computing device of the customer; determining whether the request originates from a first client computing device comprising a first processor or from a second client computing device comprising a second processor, wherein the first client computing device comprises a slower central processing unit or a lower resolution display than the second client computing device; and responding to the request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with the first client computing device if the request originated from the first client computing device; and responding to the request by adjusting and customizing the level of graphics and data sent to the client device to a format compatible with the second client computing device if the request originated from the second client computing device.

6. Any comments considered necessary by applicant must be submitted no later than the payment of the issue fee and, to avoid processing delays, should preferably accompany the issue fee. Such submissions should be clearly labeled "Comments on Statement of Reasons for Allowance."

Conclusion

7. The prior art made of record and not relied upon is considered pertinent to applicant's disclosure.

-Bentley et al (EP 0802664A2) disclose controlling and monitoring communication between customers and customer service representatives.

-Thomson (What Do your Customers Really Want? (Special Focus: Marketing Strategies)) discloses companies utilizing customer-focused marketing strategies to attract and retain customers.

- Anonymous (The New Call Center: Not just for calls anymore) discloses call center applications taking advantage of communications channels other than voice.

8. Any inquiry concerning this communication or earlier communications from the examiner should be directed to Andre Boyce whose telephone number is (571) 272-6726. The examiner can normally be reached on 9:30-6pm M-F.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Tariq Hafiz can be reached on (571) 272-6729. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Art Unit: 3623

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

adb

adb
June 19, 2007

Beth Van Doren
AU 3623
Primary Examiner